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ABSTRACT

This chapter of "Principles of School Business Management" provides an overview of the history, regulation, and administration of school lunch programs and related food services. The historical review discusses factors prompting federal intervention in food programs for school children and cites legislation mandating funding. The chapter then describes federal regulations related to the National School Lunch and Child Nutrition programs that appear likely to remain in effect during coming years. These regulations include basic program requirements and characteristics as well as regulations regarding the foods served. The organization of a district's food service is considered next; the chapter addresses organizational goals, types of management systems, onsite and satellite food preparation systems, a la carte and snack programs, and staffing. The management of the program's schedule, personnel, purchasing, and equipment is discussed next, followed by comments on the financial management of the program. Eight tables display typical organizational structures, staffing guides, food storage information, federal reimbursement levels for 1986-87, a formula for determining monthly food costs, and a sample inventory control form. Sixteen resources are cited. Appendices provide food service job descriptions and a sample performance evaluation report. (PGD)

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Foodservices At School

Dorothy Van Egmond-Pannell

What's for lunch? Often the aroma has penetrated the halls by 11 a.m. and one can guess what's for lunch. A question that faces every school administrator or school district at one time or another is what to do about food at school. Will they sell snack items from a vending machine? Will they have a school lunch program? Is that the school's obligation? Who will run it?

Over 90 percent of the nation's 89,200 public schools participate in the Child Nutrition and National School Lunch Programs which serve over 23.9 million children a day a nutritional lunch. The funding provided by these federally subsidized programs is carefully regulated. Since such a large percentage of the public schools and many private schools participate in these federal programs, this chapter will concentrate on meeting the federal regulations and running a successful, cost-effective lunch program.

Operating a financially successful school lunch program that meets federal and state regulations is no easy task. Explaining how to do it in one chapter is impossible; therefore, two government publications, a manual published by ASBO International, and a textbook, are recommended for additional information and guidance.
These sources are:

Menu Planning Guide for School Food Service, 1983, PA 1260, United States Department of Agriculture. It may be obtained through the U.S. Government Printing Office, Washington, DC, or the state supervisor for Child Nutrition Programs.

Food Buying Guide for Child Nutrition Programs, 1984, PA 1331, United States Department of Agriculture. It may be obtained through the U.S. Government Printing Office, Washington, DC, or the state supervisor for Child Nutrition Programs.

The School Foodservice Handbook, A Guide for School Administrators, 1987, Association of School Business Officials International. It may be obtained from Association of School Business Officials International, 1760 Reston Ave., Suite 411, Reston, VA 22090.

School Foodservice, 1985, by Dorothy Van Egmond-Pannell. It may be obtained from AVI Publishing Company, Inc., P.O. Box 831, Westport, CT 06881.

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Brief History

Beginning in the early 1900s many teachers were trying to find ways to feed poor children. Farmers would donate food and the smell of a pot of soup cooking on a wood burning stove was common in schools. Federal funds were first available in the 1930s to buy some surplus commodities.

The School Lunch Program grew rapidly because teachers and principals knew there would be few eager minds with empty stomachs. When Works Project Administration (WPA) provided funds to hire the unemployed and needy women, the school lunch program had its first paid staff.

World War II slowed the progress. However, at the end of the war school lunch was recognized as being important. It is important to note that many young men failed military physical examinations because of malnutrition. This problem needed to be corrected. General Hersey stated before Congress that it was in the best national interest to operate a sound program that would provide nutritious food. Also, the program provided an outlet for surplus farm products.

The National School Lunch Act was passed in 1946 and signed into law by President Truman. It placed emphasis on "safeguarding the health and well-being of the nation's children." The National School Lunch Act provided a small subsidy for all children's lunches between 1940s and 1960s. The subsidy was not enough to cover the cost of the needy child's lunch; however, those children were served by many school districts.

The following are basic requirements most of which are still in effect today:

1. Serve lunches that meet nutritional requirements as set by the Secretary of Agriculture. (The program was put under the Department of Agriculture to administer because of the connection with donated foods.)

2. Serve meals at no or little cost to needy children, under guidelines set by local school officials. (Guidelines are now set by the federal government.)

3. Operate the program on a nonprofit basis.

4. Utilize donated foods as much as possible.

5. Keep records of income and expenses to be submitted to state agencies. The program is administered at the state level by the Department of Education.)

In the 1960s, politicians realized poverty was severe in some parts of the country. A group of Congressmen toured the South and were shocked by how hunger affected children. As a result, the Child Nutrition Act of 1966 became law which made available additional funds and programs. The Breakfast Program was begun on a pilot basis. Money was provided to assist with purchasing equipment (which was cut in the early 1980s). A federal free and reduced-price meal program policy was established with poverty income guidelines and application procedures. Funds were made available to defray the costs of providing meals free or at reduced prices.

Until 1981, funding increased for school lunch programs. The first federal reduction in subsidy came in early 1981, however, sending school lunch prices up across the country an average of 15-20 cents. Despite the fact that the President's Budget has proposed cuts yearly since 1981, Congress has usually left the pro-

gram's budget alone since it affects so many people. Nevertheless, the rising federal deficit of the late 1980s continued to make school officials feel uneasy about future funding for the school lunch and breakfast programs.

On the national level the Child Nutrition programs are very political. Laws and regulations frequently cause changes in the way the programs operate.

The following pages of this chapter discuss only those federal regulations that appear to be "permanent" for the next few years. Each year, it is wise to ask the state supervisor assigned to your area what changes in the regulations have been made.

Basic Program Requirements and Characteristics

In order to be eligible for federal funds under the National School Lunch and Child Nutrition programs, schools must agree to the following:

1. *Operate a non-profit program.* As much as a three-month operating balance may be kept on hand and still be considered non-profit. Management companies operating at a profit are exempted.

2. *Serve meals (lunches and/or breakfast) which meet nutrition requirements.* Originally known as the "Type A" lunch, the varied portion-size meal pattern discussed later in this chapter was released in 1980.

3. *Price the meals (lunches and/or breakfasts)* as a unit. This limitation does not prevent foods from being sold as separate items. In order for a lunch to be counted as a reimbursable lunch, however, it must be priced as a unit. Sales of seconds will be additional income.

4. *Supply free and reduced-price meals to eligible needy children.* Uniform Policy requirements must be carefully followed.

5. *Agree to avoid discrimination.* No child may be refused a meal under the program because of their inability to pay or due to their race, sex, color or national origin.

6. *Keep accurate records of income and expenditures.* These records are subject to state and federal audits. These records are to be maintained for three full school years plus the current year.

7. *Complete a formal reimbursement claim.* The written claim must be sent on a timely basis each month to the state.

8. *Distribute applications for free and reduced-price meals.* At the beginning of each school year each student enrolled in an eligible school must receive applications to participate in the program.

9. *Review and act on free and reduced-price meal applications.* In accordance with state guidance materials, parents/guardians must be notified

with respect to any action taken on their application. Refer to the Uniform Policy issued yearly by the state for details.

10. *Develop and implement a verification procedure.* To confirm eligibility for free and reduced-priced meals free and reduced-price meal applications must be developed and disseminated.

11. *Maintain accurate participation records.* Establish a procedure for obtaining accurate meal count by category (paid, free, reduced, adult) on the serving line at the point of service.

12. *Establish and implement purchasing procedures.* These must be in compliance with state and federal regulations.

13. *Utilize federally donated foods or commodities.* This includes the ability to store them correctly, so that they do not spoil.

Regulations Regarding Foods Served

The nutritional requirements of the National School Lunch and Child Nutrition programs for lunch can be understood by carefully going over the School Lunch Patterns shown in Table 14:1. The two guidance materials published by USDA are essential to fully understanding the School Lunch Patterns and to assuring they are being carried out. Those guides are the *Food Buying Guide* and the *Menu Planning Guide*.

School Lunch Pattern

The nutritional goal for school lunches is to provide approximately one-third of the Recommended Dietary Allowances (RDA) as specified by the National Research Council for children of various ages. The nutrition standards include 19 vitamins and minerals plus protein and calorie requirements. The School Lunch Patterns provide a framework for planning nutritionally adequate school lunches.

According to federal regulations, in order to receive reimbursement a school's lunch must contain four components and five menu items. The four components are: 1) meat/meat alternate, 2) vegetable and/or fruit, 3) bread/bread alternate, and 4) milk. As table 14:1 indicates, two vegetable/fruit components must be included on the menu.

The lunch patterns provide five portion sizes based on ages and grades. Group IV will meet all age groups' requirements. It also most resembles the original "Type A" lunch, which was used as the guide until 1980. Group IV serving sizes are discussed as an example of the meal pattern.

Meat and Meat Alternate. One serving is equal to two ounces of edible lean meat, poultry, or fish or meat alternate, such as two ounces of cheese, one egg, one-half cup of cooked dried peas or beans, or four tablespoons peanut butter or any combination of these items. The meat or meat alternative must be served in the main dish and one other item. Serve no one form of meat or meat alternative more than three times a week if no choice is offered.

Table 14:1 School Lunch Patterns For Various Age/Grade Groups

U.S. Department of Agriculture, National School Lunch Program USDA recommends, but does not require, that you adjust portions by age/grade group to better meet the food and nutritional needs of children according to their ages. If you adjust portions, Groups I-IV are minimum requirements for the age/grade groups specified. If you do not adjust portions, the Group IV portions are the portions to serve all children. **COMPONENTS**	MINIMUM QUANTITIES **Preschool** ages 1-2 (Group I)	 ages 3-4 (Group II)	**Grades K-3** ages 5-8 (Group III)	**Grades 4-12** age 9 & over (Group IV)	RECOMMENDED QUANTITIES[1] **Grades 7-12** age 12 & over (Group V)	SPECIFIC REQUIREMENTS
Meat Or Meat Alternative A serving of one of the following or a combination to give an equivalent quantity						• Must be served in the main dish or the main dish and one other menu item. • Vegetable protein products, cheese alternate products, and enriched macaroni with fortified protein may be used to meet part of the meat/meat alternate requirement. Fact sheets on each of these alternate foods give detailed instructions for use.
Lean meat, poultry, or fish (edible portion as served)	1 oz	1½ oz	1½ oz	2 oz	3 oz	
Cheese	1 oz	1½ oz	1½ oz	2 oz	3 oz	
Large egg(s)	½	½	¾	1	1½	
Cooked dry beans or peas	¼ cup	¼ cup	¾ cup	½ cup	¾ cup	
Peanut butter	2 Tbsp	3 Tbsp	3 Tbsp	4 Tbsp	6 Tbsp	

Vegetable And/Or Fruit	Two or more servings of vegetable or fruit or both to total	⅛ cup	¼ cup	½ cup	¾ cup	1 cup	• No more than one-half of the total requirement may be met with full-strength fruit or vegetable juice. • Cooked dry beans or peas may be used as a meat alternate or as a vegetable but not as both in the same meal.
Bread Or Bread Alternate	Servings of bread or bread alternate A serving is: • 1 slice of whole-grain or enriched bread roll, muffin, etc. • A whole-grain or enriched biscuit, roll, muffin, etc. • ½ cup of cooked whole-grain or enriched rice, macaroni, noodles, whole-grain or enriched pasta products, or other cereal grains such as bulgur or corn grits • A combination of any of the above	5 per week	8 per week	8 per week	8 per week	10 per week	• At least ½ serving of bread or an equivalent quantity of bread alternate for Group I, and 1 serving for Groups II-V, must be served daily. • Enriched macaroni with fortified protein may be used as a meat alternate or as a bread alternate but not as both in the same meal. NOTE: *Food Buying Guide for Child Nutrition Programs*, PA-1331 (1983) provides the information for the minimum weight of a serving.
Milk	A serving of fluid milk	½ cup (6 fl oz)	¾ cup (6 fl oz)	½ pint (8 fl oz)	½ pint (8 fl oz)	½ pint (8 fl oz)	At least one of the following forms of milk must be offered: • Unflavored lowfat milk • Unflavored skim milk • Unflavored buttermilk NOTE: This requirement does not prohibit offering other milks, such as whole milk or flavored milk, along with one or more of the above.

NOTES: 1. Group IV is highlighted because it is the one meal pattern which will satisfy all requirements of the portion size adjustments as made.

2. Group V specifies recommended, not required quantities for students 12 years and older. These students may request smaller portions, but not smaller than those specified in Group IV.

Vegetable and/or Fruit. The required three-fourths cup must consist of two or more servings of vegetables or fruit or both. Full-strength vegetable or fruit juice may not be counted for more than one-half of the total requirement.

Bread or Bread Alternate. The minimum quantities for the bread or bread alternate component are eight servings per week. Regulations specify that a minimum of one bread or bread alternate must be served each day. Only breads or bread alternates that are whole-grain or enriched may be used to meet the required amounts. One serving of bread or bread alternate is equivalent to: a) one slice of whole-grain or enriched bread; b) an enriched biscuit, roll or muffin; c) one-half cup of cooked enriched rice; d) one-half cup of cooked macaroni, noodles or other whole-grain or enriched pasta; or e) one-half cup serving of cereal grains such as corn grits or bulgar.

Milk. The milk component is met by serving one-half pint of fluid milk. Schools must offer unflavored lowfat milk, unflavored skim milk or unflavored buttermilk. In 1986, Congress discussed the possibility of requiring that whole milk be offered. Flavored milk may also be offered as a choice.

Other Foods. Add as necessary to complete lunches, to help improve acceptability and to provide additional food energy (calories) and other nutrients. To help ensure that all school lunches meet the nutritional goal, the following recommendations have been suggested:

1. A choice of foods should be offered.
2. The amount of fats, salt and sugar in the lunch should be kept at a minimum.
3. Vegetables or fruits rich in Vitamin A should be served at least twice a week.
4. Fruits or vegetables rich in Vitamin C should be served several times a week.
5. Several foods rich in iron should be served each day.

Refer to the *Menu Planning Guide* for a complete list of foods high in Vitamin A, Vitamin C and iron. Refer to the School Lunch Patterns table for portion sizes.

To comply with federal regulations, the complete school lunch must be planned and offered to students and consist of a menu of the following five food items:

- Meat or meat altenate
- Vegetable or fruit #1
- Vegetable or fruit #2
- Bread or bread alternate
- One-half pint milk

Other foods, such as dessert, may be added. However, the "offer" requirements apply to the basic five food items.

"Offer versus Served"

In order to minimize food waste in the National School Lunch Program, Congress has established "offer versus serve" requirements which allow students to choose less than all five food items within the lunch pattern. While Public Law 94-105

requires that high school students be *offered* all five food items of the school lunch, according to "offer versus served," students can refuse two of the five menu items which they do not intend to eat, thus reducing plate waste. The choice of three of four items does not relieve the non-needy child from paying the full price of the meal.

Local School Food Authorities (SFAs), persons within a school district with the legal authority to enter into a food services contract, may also permit students in junior high, middle schools or elementary schools to select three or four items rather than five items under "local option." The "offer vs. served" provision applies only to the lunch program; it is not allowed in the school breakfast program. Schools are encouraged to emphasize merchandising techniques and serve food attractively in order to encourage students to choose all five menu items.

School Breakfast

School breakfast under the federally funded programs must contain as a minimum:

- ½ cup serving of fruit, vegetable, or fruit or vegetable juice,
- 1 serving of whole grain or enriched bread, bread alternate, or cereal, and
- ½ pint of fluid milk

All parts of the breakfast must be served, since breakfast are not eligible for the "offer vs. served" provision.

To improve the nutrition of the participating children, breakfast should also include, as often as possible, a meat or meat alternate, such as one egg, one-ounce serving of meat or cheese, or two tablespoons of peanut butter. Congress has discussed increasing the funding to enable protein-rich menus to be offered more often. There may be additional state requirements on what is to be served, and some states have mandated breakfast programs.

Reimbursement

As with the lunch program, the federal reimbursement rates for each breakfast served students is based on the income of the participating student. Where available, students who qualify for a free or reduced-price lunch, also qualify for a free or reduced-price breakfast.

If a school has over a certain percentage of students qualifying and eating free and reduced-priced lunches, the school will qualify for "severe need" assistance, which is a higher breakfast reimbursement rate. This should be checked yearly by the school administration. For example, if in 1985 a school served over 40 percent free and reduced meals, that school qualifies the following year for "severe need" rates.

Competitive Foods

Competitive food regulations of the state and federal governments may differ; therefore, it is important to learn what the state requirements are currently. Local school districts can establish their own regulations, which must include the state and federal regulations, but may (and should) exceed these regulations.

U.S.D.A. Donated Commodity/Food

The United States Department of Agriculture (USDA) offers surplus or otherwise available foods to each state for the lunch program under the Commodity Program. Congress' annual appropriation includes funds for both cash assistance and for the purchase of agricultural commodities. These foods are usually of good quality. Once the school accepts commodities, it is responsible for ensuring that they are stored properly and utilized.

The USDA acquires foods for donation under three authorizations:

Section 6 (National School Lunch Act). These foods are restricted to the schools participating in the National School Lunch Program and are to be used only in preparing pattern lunches.

Section 32 (Public Law 320 as amended in 1936). If a school receives Section 32 commodities with the letter R in front of the 32 (R32), this indicates that the commodity is restricted and is to be used in the same manner as Section 6 commodities.

Section 416 (Agricultural Act of 1949). May be used in all phases of the school feeding programs.

Allocation of Commodities. Commodities are offered to schools on an "offer and acceptance" basis with the exception of Section 6 items purchased from the National School Lunch appropriations. These items are allocated as they become available to schools participating in the National School Lunch Program on the basis of the certified approved participation.

Lost, Spoiled or Damaged Commodities. Schools are financially responsible for commodities lost through spoilage or theft due to negligence or failure to provide adequate protection in the way of proper storage or protection of the commodities in possession of the school. If a substantial loss of commodities due to spoilage, infestation, fire or theft occurs, it should be promptly reported to Food Distribution at the state level.

Alternative to Commodities. Many school districts have found the USDA commodity program to be very rigid, expensive, wasteful and not geared to students' tastes. In 1981, Congress mandated a three-year study of two alternatives—*Cash* and *Commodity-Letter-of-Credit*. The sixty-six school districts testing the alternatives found the alternatives to be a considerable improvement over the USDA commodity program. With the CASH alternative the entitlement moneys were provided with little restrictions. With the Commodity-Letter-of-Credit alternative, the moneys are earmarked for specific foods that USDA has determined to buy under the commodity programs. The study found the advantages of the alternatives to be improved flexibility, reduced labor needs, improved student acceptance of menus served and reduced transportation and storage costs. There was very little, if any, negative effect on the farm market with the use of the alternatives nationwide.

Many supporters of the school lunch program consider it politically unwise to break any ties with the agricultural community, and, therefore resist any change in the commodity program. Others argue that the Commodity-Letter-of-Credit alter-

native maintains farming ties and is a manageable solution as a local option. While changes of this nature are generally slow to happen in this program, however, the growing discontentment with the present commodity program may promote an option-type alternative in the near future.

Aims Audits

In 1983, USDA began requiring states to periodically perform on-site audits of all school districts. The audits are referred to as AIMS audit—Assessment, Improvement, and Monitoring System. The audits determine whether or not the local school foodservice is: 1) offering or serving meals that meet the meal pattern requirements; 2) carrying out the free and reduced-price meal policy requirements; 3) accounting for meals served at the point-of-sale correctly; and 4) is in compliance with all the state and federal regulations. If deficiencies or errors are found to be present, the local school district is usually provided time to correct the problems. If the problems are not corrected the penalty is usually loss of funding.

Organization

How a school district organizes foodservices within its structure depends on a number of factors including: 1) the relative importance placed on nutrition and foodservice vis à vis educational goals; 2) the size and number of schools within the district and the size of the school-age population; 3) economic background of students; 4) the plant facilities and equipment; and 5) the school budget.

Goals

Goals are important when deciding how to structure and implement a foodservice program. A district must determine the relative *importance* that will be placed on foodservice at school. Is it to be a necessary evil or is it to serve the nutritional needs of students and be an important contribution to educational goal attainment? Examples of goals include:

- To provide nutritional food that students will enjoy eating.
- To run a financially successful operation, within the funds available, and keep prices reasonable.

The goals for the foodservice program should be established by the board of education with the assistance of the administation needs. Without understanding the school board's philosphy toward the program and nutrition, implementation of the program may be fragmented and inefficient.

Clearly articulated program goals not only help the community understand the school district's philosophy toward nutriton and education, but also help generally with public relations. In fact, one goal of a foodservice program may be to support or interact with other community programs (such as those for senior citizens and day care centers). The result may be community support for the school service program and the school administration.

Type of Management System

There are essentially three configurations for management which will affect the organization and implementation of foodservices within a district. They are: 1) contracting with an outside management company; 2) having the central administration coordinate and administer the program for all schools; and 3) having each school (or clusters of schools) coordinate and administer the program.

In some parts of the country, particularly the northeast, contracting is a growing trend. For example, one large food management company had $75 million in volume in 1985.

Management Company. The advantages and disadvantages of a management company should be considered. If a school district has a well-run program, it does not need the service of a management company. On the other hand, a good management company can provide management and expertise that may not be available locally or relieve the school administration of the problems associated with foodservice delivery.

A foodservice management company generally charges the school district a fee based on the number of meals served, usually between four and five cents per meal. However, some states like New York, have regulations that require a management company to operate under a fixed-fee contract rather than a cents-per-meal contract. Some states require the school district to take the lowest bid, which means the specifications must be well written.

If a school district employs a management company, it is important to have details in writing and a firm understanding of who does what and who pays for what. Also, check with the state supervisor for Child Nutrition Programs to ensure that you understand all state requirements.

Centralized versus Decentralized Management. School districts who manage their own foodservice will probably be faced with the decision of centralized versus decentralized supervision—or how much of the responsibility for the program will lie with the principal? Since most principals do not have the time to run a restaurant, the local foodservice manager, or the school district's supervisor will have much of the responsibility for the day-to-day operation.

The benefits of centralized management relate primarily to efficiency in use of personnel and cost effectiveness. They include:

1. Reducing workload of principals.
2. Increasing expertise by enabling the district to employ someone with training and experience in foodservice mangement as a central supervisor.
3. Due to item 2, provide improved staff training.
4. Reducing duplication of effort by having central office personnel handle regular activities such as menus, state reports and purchasing.
5. Securing lower prices through competitive bid process and volume buying.
6. Helps ensure compliance with state and federal regulations and, thus, prevent loss of federal funds.

Food Systems

The type of food system that will be used may also affect organization of the program. *On-site preparation* is most common among the 89,200 schools in the

program. As labor costs increase, more and more school districts are looking at alternatives, since on-site preparation is usually the most expensive to operate.

Satellite foodservice. This refers to a system where food is prepared at one location for serving at another. It began to be popular in the late 1960s when increased funding became available under the Child Nutrition Act. A school receiving prepared food may have a finishing kitchen or merely a serving kitchen. Basically there are three types of satellite systems: 1) *bulk*, ready-to-serve is when the transported hot food is kept hot and the cold foods cold; 2) *cook/chill*, or freeze method is where the food is transported pre-cooked and ready for reconstituting in the oven or kettle (used in Shreveport (LA) School District in the 1970s, but did not really begin replacing the hot bulk method until the 1980s); and 3) *pre-plated* meals are pre-portioned ready-to-serve immediately or, where facilities permit, heated on-site (heating on site is preferred).

The pre-plated lunch may be produced by the school district or purchased from a commercial company. Individual portions are available as well as the T.V.-type dinner. The flexibility of the individual portions has caught on in many areas.

To engage in pre-plating successfully a school district needs a minimum volume of 15,000 to 25,000 meals a day to realize savings. While an extremely effective method of producing a lunch, it requires volume, an assembly-line and automated production to make it work. For the many school districts which built their commissaries in the early 1970s, such as Corpus Christi (TX) School District, Rowland (CA) Unified School District, and Dayton (OH) Public School District, the concept has worked well.

It may not work well where a school community has had an on-site kitchen. Converting an "on site" kitchen school to a satellite operation often meets with community resistance. Adults, including teachers, are usually the most resistant to such changes. Their fears are unfounded if the satellite concept is well planned. As labor costs increase, school districts should consider other alternatives, such as a satellite operation in order to keep from raising the price of lunch.

Bulk satelliting can reduce the cost of producing a lunch from 20 cents to 10 cents. For exampie, with the case of a small school district, the high school can act as the production kitchen for the junior highs and elementary schools in the area.

A conversion to the cook/chill or freeze method can be made with a small investment in equipment—basically a large kettle, ice machine, sufficient freezer/refrigerator space for storage, and a stand specifically made to hold the bags the food is poured into, hot from the kettle. Ice is used to cool the product quickly for storage in the refrigerator or freezer until used later. The prepared "school-made-soup" (or whatever) can be shipped out to the "finishing kitchen" where it is heated and served. The quality of the finished products should be equal to the status of the food when it was put into the bag for transporting.

In order for savings to be realized from a satellite operation, staffing has to be cut and production has to become an efficient procedure.

A la Carte and Snack Programs

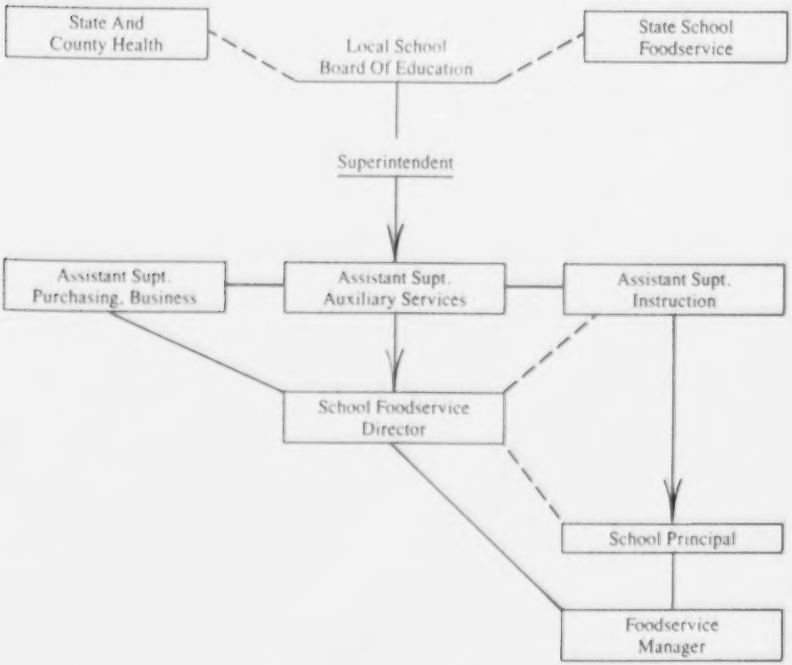
Will foods be sold a la carte and will there be a snack program in addition to the lunch? In many states, this is a local decision. Some states, including Mississippi, have detailed regulations pertaining to what can be sold in competition with the school lunch program. It is advisable to check with the state supervisor of Child Nutrition Programs to determine what state regulations are in effect.

Snack programs sometime replace or supplement a breakfast program, particularly in high schools where not many students qualify for free or reduced-priced meals. If students' participation in the school lunch program is less than 70 percent, it may be desirable to offer high school students a snack option. In addition, the revenue generated from the snacks and seconds being sold a la carte can be used to help subsidize the lunch program. The snack items should be carefully selected, with nutrition considered as an important factor.

Structure and Staffing

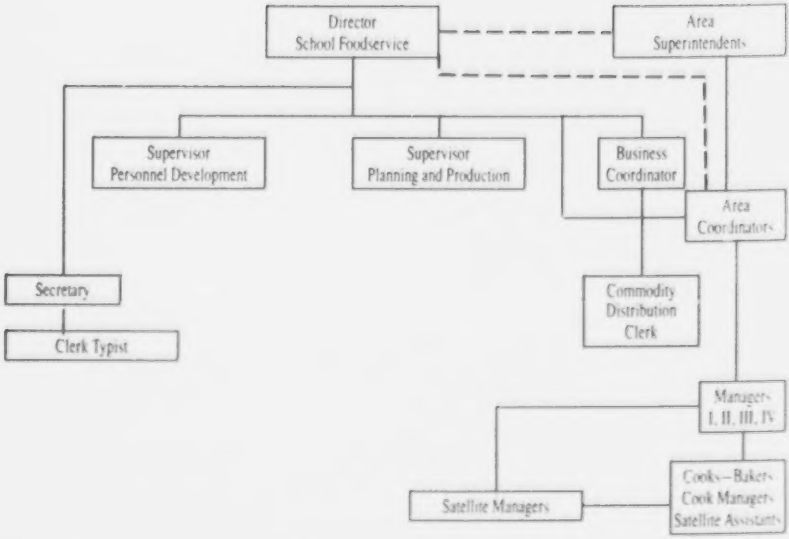
School districts which run their own foodservice programs will differ in structure depending on whether they use a centralized or decentralized format, the type of facilities and equipment and the number and expertise of personnel assigned to the foodservice effort.

The organizational charts appearing in Figures 14:1-3, are illustrative of a variety of well-structured organizational alternatives.



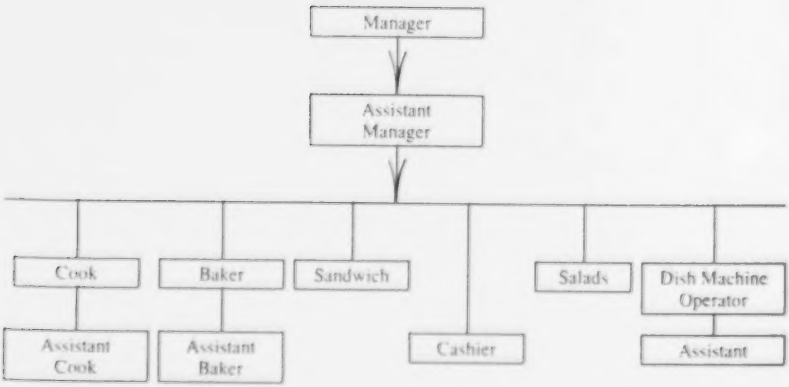
Source: Van Egmond Pannell, *School Foodservice* (Westport, Ct.: Avi Publishing Co., 1985).

Figure 14:1 Example of Centralized Foodservice Organizational Structure.



Source: (same source as above)

Figure 14:2 Organizational Structure for Large Centralized Foodservice Program



Source: (Same as 14:1 & 14:2)

Figure 14:3 Single Unit Foodservice Organizational Chart for a Large Secondary School with á la Carte Sales.

In addition to organizational structure, staffing depends on expertise and size of school population to be served.

Number of Staff. The number of staff needed is usually based on number needed at serving time. By drawing out a symbolic kitchen/serving area, it may be easier to establish how many people are needed. There are a number of different staffing formulas based on labor hours needed. The one shown in Table 14:2 is fairly typical of what has been established by states and school districts as their standard.

Table 14:2 Staffing Guidelines for School Lunch Program[1]

Number Lunches Served	Meals per Labor Hour	Total Hours
Up to 100	9½	9-11
101-150	10	10-15
151-200	11	15-7
201-250	12	17-20
251-300	13	20-22
301-350	14	22-25
351-400	14	25-29
401-450	14	29-32
451-500	14	32-35
501-550	15	35-36
551-600	15	36-40
601-700	16	40-43
701-800	16	43-50
801 +	18	50 +

[1]These recommendations do not include hours for breakfast, a la carte, or dinner.

Source: D. Van Egmond-Pannell, *School Foodservice* (1985).

After the number of hours and the number of people have been established the next step is dividing the labor hours among the number of people. The meals per labor hour are calculated by dividing the total number of meals served (give an equivalency to a la carte sales, etc.) by the total labor hours at the location. An equivalency formula that may be used is $1.65 in a la carte sales is equal to one lunch. This is based on the premise that the national average cost of producing and serving a lunch was $1.58 in 1985.

Staffing Configuration. The school foodservice director or supervisor for a centralized system should have a nutrition, foodservice and administrative background. Depending on the size of the school district, the staff may consist of several supervisors, specialists, accountants, buyers and clerical people. Two typical organizational charts are presented in Figures 14:1 and 14:2.

At the school level the manager may have assistant managers, heads of departments (salad, cooking, bakery and so on) and a number of staff people (See Figure 14:3). This should be decided based on number of serving lines and type preparation.

The American School Food Service Association has developed position descriptions and qualifications for foodservice personnel. See Appendix A of this chapter for a description of these. Tables 14:3 and 14:4 offer staffing guides for an elementary school and secondary school.

Table 14:3 Staffing Guide for Elementary School Foodservice Serving 400 Lunches on a Line

(Lunch Served from 11:00-12:45)

Position	Arrival/ Departure	Total Hours**	Assignment At Serving Time
Manager	8:00-3:00*	6½	Supervision Back Up Serving Line
Cook	8:00-2:30*	6	Cooking
Baker	8:30-2:00*	5	Serving
Salad	9:00-2:30*	5	Backing Serving Line
Staff	10:30-2:00	3	Serving
Cashier	10:00-2:00*	3½	Cashier
		29 (staffed at 14 meals per labor hour using disposables)	
Dish Machine Operator	10:30-2:00	3	Dishwasher
		32 (staffed at 13 meals per labor hour using dish machine)	

*Includes 30 minutes for lunch (on their own time).

**Hours paid.

Table 14:4 Staffing Guide for High School Foodservice Serving 1500 on 3 Serving Lines, Salad Bar and Snack Bar

(Lunch Shifts: 11:00, 11:30, 12:00, 12:30)

Position	Arrival/ Departure*	Total Hours**	At Serving Time
Manager	7:30-3:00	7	Supervision of 3 Serving Lines and Kitchen
Asst/Manager	7:30-3:00	7	Supervision of Snack Bar and Salad (backing)
Cook	8:00-2:30	6	Cooking
Asst/Cook	8:00-2:30	6	Cooking and Backing Line 1
Baker	8:00-2:00	5½	Backing Line 1
Asst/Baker	8:30-2:00	5	Backing Line 3
Salad	8:00-2:00	5½	Backing Salad Bar
Asst/Salad	9:00-2:00	4½	Backing Lines for Fruits and Salads
Snack Bar	8:30-2:00	5	Serving Snack Bar
Asst/Snack Bar	9:00-1:30	4	Serving Snack Bar
4 Cashiers	10:00-2:00	15 (3½@)	Cashiering Line 1, 2, 3 and Salad Bar
Head Cashiers	9:30-2:30	4½	Cashiering/Head
3 Staff	9:30-2:00	12 (3 each)	Serving Lines 1, 2, and 3
		87 hours (staffed at 17 meals per labor hour using disposables)	
2 Staff	10:30-2:30	7	Dish Machine Operators
		94 (staffed at 16 meals per labor hour using dish machine)	

*Includes 30 minutes for lunch (on their own time).
** Hours paid

In the two staffing examples salads, fruits and desserts are portioned before lunch. In the high school situation a lot of self service is being used. With the use of convenience foods the staffing in the high school could be figured at eighteen meals per labor hour and sixteen in the elementary. If all breads are being baked and "unprocessed" commodities are being used and products are being made "from scratch," the staffing will have to be increased significantly, thus, reducing the meals per labor hour.

Administration

The management and administration of a school foodservice program is similar to any other program. Aside from those governmental requirements detailed earlier in this chapter, areas of foodservice management include: personnel, purchasing plant and equipment, and finance.

Key to the adminstration of the program is the designation of the "school food authority" or SFA, that person who is legally authorized by the district to enter into a state or federal agreement or behalf of a school or district. Who fills this position depends typically on the organizational structure of the program.

Sitting Lunch Periods

Also affecting program administration is the duration of the lunch period. This decision is based on such factors as service population, number of staff and plant layout and facilities.

Studies have shown most students can eat without rushing in twenty minutes after receiving the food. The thirty-minute lunch period is adequate if no student has to stand in line more than ten minutes. An average cafeteria line with trained servers and cashiers can expect to serve ten meals per minute. Therefore, one serving line should be able to move 100 students through in ten minutes.

Students usually cause trouble or find alternatives to standing in line when they have to wait more than ten minutes to be served. The number of students the dining room will seat and the number of serving lines should be considerd when setting lunch periods.

If the students are not moving through the line at the rate of ten per minute, the problems may be one or more of the following:

1. Running out of food and students are having to wait for food;
2. Line set up is not in a logical, flowing manner;
3. Employees are poorly organized;
4. More self-service items are needed; or
5. Procedures for collecting money and tickets are too time consuming.

If a problem does exist, observe the line flow to determine where the slow down is and then determine if the slow down problem can be resolved.

Personnel Management

The primary areas relating to the management of foodservice personnel include:

- The development of clearly written job descriptions.
- A clear communication of division of responsibilities.

- Regular, periodic evaluation.
- On-going staff training.
- Determination of payscales and fringe benefits.
- Development of work schedules.

Appendix A presents a wide range of brief job descriptions. These will necessarily have to be adapted to the particular organizational situation, level of expertise and staff configuration. It is important to present a written job description to an employee at the point of hiring to ensure that the employee understands his or her work responsibilities.

Periodic training to improve or upgrade job skills or during times of organizational change should be part of the personnel management plan. In addition, evaluations should be done within at least ninety days after employment and again at the end of the first year of employment. From thereon the evaluation form used by the San Diego (CA) City Schools appears in Appendix B. It includes detailed directions.

Payscales for staff vary from a low, below minimum wage, to a high of $10.00-$14.00 per hour. Payscales among managers have as much variance. Factors to be considered when establishing the payscale are what other nearby school districts are paying, what commercial foodservices are paying, the local unemployment rates, qualification requirements and job description, and, in the case of unionization, the nature of a union contract.

Fringe benefits are becoming a major expense for schools. In many school districts costs of insurances, social security, and retirement pensions can add as much as 25 to 30 percent to the labor costs. To be considered are:

1. Will an employee meal be a fringe benefit?
2. How many sick days with pay will be provided?
3. How many, if any, annual leave days with pay will be provided?
4. Will uniforms be furnished?
5. Will laundry of those uniforms be furnished?
6. Will training and staff development be provided at no cost?

The School Foodservice Handbook, A Guide for School Administrators, published by ASBO, provides more detail on staffing and personnel related matters.

Purchasing

Purchasing of food, supplies and large and small equipment means spending a large percentage of the foodservice revenue available. Food often takes 40-50 percent of the revenue, with labor consuming a large amount. Supplies, depending on how many disposables are used, will run between 3 and 12 percent. Large and small equipment will generally take 4-5 percent, if replacement and additional purchases are made out of school foodservice funds.

Since food takes up such a large percentage of the budget, there is more information available on that subject. Since federal, state and local "public funds" are involved, the purchasing practices of all school foodservice buyers should be reviewed to ensure that the procedures used are ethical and that the desired products are obtained at fair prices.

Bid Buying. Bid buying is the written process of requesting competitive prices on products to be purchased. Detailed specifications that describe each product to be purchased are needed. This helps to ensure that the product bid is the quality

product wanted. Usually the company that is low bidder of the product(s) specified is awarded the bid. Some claim that "low bid means poor quality." That does not have to be the case. If good specifications are written and the bids presented are examined carefully to determine if the product bid is the quality desired and specified, the award made to the lowest bidder is likely to result in the purchase of a good quality product.

The bid process may take different forms. For smaller school districts the *open market* price quotes from two to four companies may be the most effective. The quotes are compared and orders are placed with the company with the lowest quote.

The alternative *informal bid* has specifications and is based on a written quote but without the format of a bid contract. As a result, either party may renege on the agreement. A *formal bidding* system includes written specifications for all products. A price quotation is given in writing and the contract is a binding one.

Collective purchasing. This system is especially useful to enhance buying power when volume is small. Two or more schools and/or other agencies pool their needs and purchase under one contract. Prices are usually better as more vendors, some of whom would not be interested otherwise, find it worth taking the time to submit a bid. Montana and Colorado school districts who have used collective purchasing have saved as much as 40 percent over what they previously paid.

It may be wise to start collective purchasing with a few food items, such as staples, canned and packaged foods. When problems are worked out and a "code of ethics" or operating procedures is established, new items can be added to the collective purchasing effort.

Specifications. Specifications should contain the following basic information:

1. Name of the product (generic, not brand, e.g. Gelatin, not Jello).
2. Federal grade, brand, or other quality designation.
3. Unit of purchase (pound, case, bag, cartons, etc.).
4. Geographical area of production (such as "Blue Lake" beans or domestically grown pineapple).
5. Variety, type, style, size, etc.
6. Condition of merchandise upon receipt.
7. Quantity to be purchased.

Purchasing for school foodservice should be done with a high standard of ethics established by the administration or the school board, not by divisional managers. School foodservice directors, supervisors, managers and purchasing agents should be informed of those standards. At the base of the standards should be obtaining the best price for the best product. If the quality obtained is not what is desirable, committees can be organized to determine suitable foodservice products.

Ordering. Orders are usually placed by the manager. If program goals include maintaining a low inventory and always serving what is on the menu, ordering is probably one of the hardest jobs for the manager. In addition, each order must be of sufficient quantity to make it cost effective for the company with the bid to deliver.

Plant and Equipment

To some extent the layout of the dining room and kitchen will affect the staff configuration and the organization of the foodservice operation. In any event, it

will contribute to making serving food and eating it more or less enjoyable.

The current trend is toward the less "institutional" more aesthetic look. Varied table sizes, comfortable type seats, room dividers, good accoustics, bright colors, adequate lighting and pleasing decor help to achieve a pleasant dining atmosphere. Good storage facilities—both dry and refrigerated—help keep foods safe, wholesome and appetizing. Careful consideration must be given to providing the needed storage facilities to insure that all foods, whether USDA donated or locally purchased, will have adequate storage facilities to maintain their high quality and nutritive value until consumed. Temperature, humidity, ventilation, rodents and insects must be controlled *throughout the storage areas.* A guide to storage types is reflected in Table 14:5.

Table 14:5 Storage For Food

Type	Temperture	Use	Characteristics
Dry-Cool	50°-70°	Semi-perishable and Staple Items	Well Lighted Dry Well Ventilated Easy to Clean Well Constructed Shelves Floor Racks Thermometer
Dry		Detergents Paper Goods	Same as above
Refrigerated Reach-in or Walk-in	32°-40°	Perishables Semi-Perishable Raw and Cooked Foods for Short Periods of Time	Thermometer Adjustable Shelves
Frozen Food Storage	0°F or below	Frozen Foods	Thermometer Shelves or Racks Properly Wrapped Packages

Source: Oklahoma Handbook for Child Nutrition.

Anyone planning to build or remodel their storage should request USDA publication, *Food Storage Guide for Schools and Institutions*, PA-403.

Equipment replacement will be a major expense facing school districts within the next five years since so many new schools were built during the '60s to meet the growing enrollment needs. Much of the commercial equipment purchased in the '60s has a twenty-five to thirty-year life expectancy. The timing will be perfect in some respects. Rising labor costs will increase the demand for automated equipment. Automation has begun to flourish in the last few years, since the computer chip was introduced in commercial kitchen equipment.

Financial Management

Financial management of the foodservice operation is similar to that of other divisions with respect to concern for securing funds, establishing a budget, cost-effectiveness and accountability and is unique in that it must establish prices and actually "earns" revenue. It must also be concerned with federal and state reimbursement procedures.

Funding and Reimbursement. If the school district has a contract with the state to participate in the National School Lunch and Child Nutrition Programs, it receives funding based on the number of meals served. Table 14:6 shows the reimbursement levels for 1986. Federal reimbursement increases yearly to offset increases in the cost-of-living unless Congress mandates changes in the escalating clause.

School lunch funding from the federal government is based on actual participation. Claims are submitted for reimbursement by local school food authority. Federal funds and commodities are distributed to state education agencies for distribution to the school food authorities at the local level.

States have to provide funding based on the federal matching formula. Some states like Louisiana and Oklahoma provide more than the minimum matching. This may change as state budgets become tight. Local governments frequently subsidize the program either directly or indirectly.

Table 14:6 Federal Reimbursement Levels for 1986-87

	LUNCH	BREAKFAST
Paying Child	$ .1312	$ .103
Free Child	.1312 1.2397	.7163
Reduced Child	.1312 .8380	.4158
Commodity Entitlement	.12	-0-
Free Severe Needy Child	-0-	.5186
Reduced Severe Needy Child	-0-	.8590

Budgeting. Part of any financial management involves the development of a budget. The school foodservice budget is much different than most in the school district. It is based on anticipated income, and it will probably have to be adjusted several times during the year. The income and the expenditures are impossible to project exactly, since the income is based on number served. Also, the expenses are based on number served and amount of food used.

In spite of the inexactness, the budget is very useful. Purchase of large and small equipment can usually be planned for and it helps prevent overspending.

Cost Accounting. An accounting system should track costs in a minimum of four

groupings: food, supplies, equipment and labor. Invoices and a signed delivery ticket should support all purchases.

To determine the cost of food for the month or week use the following formulas as presented in Table 14:7:

Table 14:7 Food Costs for the Month

A. Beginning Purchased Food Inventory First of Month $_____
B. Food Purchases during Month $_____
C. Total A & B $_____
D. Ending Purchased Food Inventory for Month $_____
E. Total Purchased Food Cost for Month (- D from C) $ _____
F. Beginning USDA Commodity Food Inventory for Month $ _____
G. Commodities Received during Month $ _____
H. Total F & G $ _____
I. Ending Commodity Inventory for Month & _____
J. Total Commodity Food Cost for Month (- I from H) $ _____
K. Total Food Cost for Month
Add total on lines E ($_____
and J ($_____) = $_____

Each month a physical inventory should be taken of foods and supplies on hand. USDA regulations require that the purchased foods be inventoried separate from the commodities. The state education agencies usually provide an inventory form, similar to the one in Table 14:8.

Table 14:8 Sample Physical Inventory Control Form

PHYSICAL INVENTORY

SCHOOL _____

DAY _____ DATE: _____

Item and Brand	Unit Size	Count	Unit Cost	Total Cost	Item and Brand	Unit Size	Count	Unit Cost	Total Cost
Bacon	lb	1	.527	.527	Eggs	doz	3	.71	2.13
Ham	lb	15 oz	1.80	1.69					

Pricing. The prices charged students and adults for the complete lunch and breakfast meals are usually established by the school board based on the recommendations of the superintendent. The superintendent will base the recommendations on the advice of the foodservices director and business manager. Taken into consideration when establishing prices are those costs directly attributable to the foodservice operation. They may include: all or a part of the food, labor, employee benefits, repairs, replacement of equipment, cleaning and paper supplies, telephone, travel for banking and training meetings and administrative, supervisory and clerical salaries.

Meal prices charged adults should cover the costs of the meal, including preparation and service. No financial assistance is received from the government or state for adult meals. Only student meals are subsidized by federal and state funds.

To some extent, pricing is a function of marketing—as it is with most businesses. Following the 1981 cut in federal funding, school districts generally raised the prices of their meals which resulted in a loss of participation in foodservice programs. The threat of cuts will most likely continue until the federal budget is balanced.

Credit. To offer credit to students and adults or not is a local decision. However, federal and state auditors discourage the practice. The procedure described is used in Fairfax County (VA) Public Schools, where the foodservice is not allowed to have charges.

Since each school's foodservice is on a cash and federal free/reduced-price meal basis, the accounting system has no provision for handling charges. To ensure that students in elementary schools do not go without lunch when they lose or otherwise do not have money, a procedure is set up for handling charges. The foodservice manager consults with the principal and establishes a system whereby the school foodservice can be reimbursed for meals served to students without money. This does not pertain to students who are authorized to receive free meals.

The foodservice manager issues a charge slip to be signed by the student and the manager. Each day the manager exchanges the charge slips for cash from the principal's office, permitting the manager to record the meal served on the day served. Collections are completed through the principal's office. Charges are not allowed to accumulate. Some cases of repeated charges may need investigation by a visiting teacher or other authorized person to establish the possible eligibility for free or reduced-price meals.

Free Meals—Adults. Foodservice employees are the *only* adults that are authorized to receive a meal free unless the school district has decided to pay for other adult meals as a fringe benefit. All other adults, including the principal, instructional personnel, custodial personnel and guests, should pay daily for meals and food received through the foodservice operation. Adults may make payments in cash or purchase meal tickets.

Conclusion

The challenges associated with running a school foodservice program are many and differ widely depending on specific circumstances. Ensuring compliance with state and federal regulations is certainly a major part. Cost control and accounting are also extremely important activities, as they are tied directly to state and federal

funding through the reimbursement and audit processes.

Still another challenge stems from viewing the school foodservice operation as a kind of business. As such, those involved with its management must be concerned with client tastes and preferences, pricing and "packaging."

Finally, the school foodservice operation should have as its goal to contribute to the educational goals of the school or district by providing nutritious meals to the students.

Further Readings

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Appendix A
Job Categories for a School Food Service Program

	Education	Experience	Classification
School Food Service Director Plans, organizes, directs, administers and assumes responsibilities of the food service program in a school system according to Board of Education policies. Recommends policies, procedures and directions. Serves as consultant on nutrition education and food services. Responsible to Superintendent of Schools or School Business Administrator.	Bachelor's Degree from accredited college with emphasis in food, nutrition, institution administration, education or related fields. Advanced degree recommended. ASFSA membership recommended.	Diversified experience in school food service administration with progressively more responsible positions.	System level administrative position. Recommended for all systems.
School Food Service Assistant Director Assists in planning, organizing and implementing the food service program in a school system according to Board of Education policies. Serves as resource consultant on nutrition education and food services. Responsible to School Food Service Director.	Bachelor's Degree from accredited college with emphasis in food, nutrition, institution administration, education or related fields. Advanced degree recommended. ASFSA membership recommended.	Diversified experience in school food service administration with progressively more responsible positions.	System-level administrative position. Recommended as needed depending on size and requirements of school system.
School Food Service Specialist Serves as staff assistant to school food service director. Develops program's educational aspects for better health and nutrition. Supervises food service activities of more than one school. Responsible to School Food Service Director.	Associate Degree in Food Service recommended. Bachelor's Degree with emphasis in food, nutrition institution administration or education desirable. ASFSA membership recommended.	Diversified experience in food service supervision and management with training in nutrition education.	System-level position. Recommended as needed, depending on size and requirements of system.
School Food Service Manager Manages food service program in individual school according to system policies, procedures and methods. Cooperates with principal and teachers to promote program's educational values. Supervises and instructs food service personnel. Maintains high standards of food preparation and service with emphasis on appetizing appeal, maximum nutritive value and flavor. Maintains high standards of sanitation and safety, records of cash, food, supplies, and equipment. Responsible to Food Service Director or Specialist. Because of the wide variation in degree of responsibility on the managerial level, a grading method is recommended on a systemwide basis. Such grading plan would include such factors as: number and type of meals served daily, percent participation, number of employees and nature of responsibilities.	High School Diploma or equivalent recommended. Specialized education and training in school food service management recommended. ASFSA membership recommended.	Diversified experience in food service production and management with progressively more responsible positions.	School-level position. Recommended for all schools.

School Food Service Manager-Cook In some school systems the responsibilities of both manager and cook are incorporated into one position—Manager-Cook. This person assumes the management responsibilities of the School Food Service Manager and performs food preparation and service activities according to school system policies.	High School Diploma or equivalent recommended. Specialized education and training in food service production and management recommended. ASFSA membership recommended.	Diversified experience in school food service production and management with progressively more responsible positions.	School-level position. Recommended as needed depending on size and requirements of school.
School Food Service Assistants In this category are all persons in food production and service who perform such activities as: preparing, cooking, and serving food, cashiering, washing and sanitizing food service utensils, and assisting with other food service activities required for the program's operation. Responsible to School Food Service Manager or Manager-Cook. If needed, a school system may further classify Food Service Assistants according to job function, skills and training required. Such a classification may be:			
Grade III—Skilled food production and service employed with specialized training and/or experience.	High School Diploma or equivalent desirable. Must have ability to follow oral and written instructions. Facility in arithmetic. ASFSA membership recommended.	Two years of paid experience in quantity food preparation and service desirable. Willingness to improve skills through specialized training and experience in quantity preparation and service.	School-level position. Recommended according to needs.
Grade II—Semi-skilled food production and service employees.	High School education or equivalent desirable. Must have ability to follow oral and written instructions. Facility in arithmetic. ASFSA membership recommended.	One year of paid experience in quantity food preparation and service desirable. Willingness to improve skills through specialized training and experience in quantity food preparation and service.	School-level position. Recommended according to needs.
Grade I—All other food production and service employees who assist in the program's operation.	8th grade education desirable. Must have ability to follow oral and written instructions. ASFA membership recommended.	Willingness to improve skills through specialized training and experience in quantity food preparation and service.	School-level position. Recommended according to needs.

Appendix B
Sample Performance Evaluation Report

Use ink or typewriter for final markings

Employee Name	Social Security No.	Cost Center Name	Cost Center No.
Position Title	Employee Status	If Unscheduled Report, check here: ☐	DUE DATE

SECTION A — Unsatisfactory	Requires Improvement	Meets Standards	Immediate supervisor must check each category in appropriate column. FACTOR CHECK LIST
		X	1. *Observance of Work Hours:* Dependable and punctual attendance.
		X	2. *Productivity/Quality of Work:* Completes an acceptable level of quality work.
		X	3. *Job Skill Level:* Demonstrates required skills.
		X	4. *Communication Skills:* Communicates well orally and in writing; effectively carries out verbal and written instructions.
		X	5. *Working Relationships:* Works with and relates to others effectively.
		X	6. *Adaptability/Flexibility:* Accepts change; works effectively under stress; responds to varying needs.
		X	7. *Observance of Safety/Health Standards:* Demonstrates knowledge of district safety/health/sanitary procedures.

SECTION B
Superior performance in any category should be described in detail. Check marks in "Unsatisfactory" or "Requires Improvement" must be supported with documentation.

Since September you have shown an active interest in acquiring new job skills. You have taken some positive steps to accomplish this by accepting extra hours. You also have begun learning the operation of the cash register and filling out the daily accounting reports that are part of the job. You are presently learning the breakfast routine at L.V. Annex. By accepting change in your assignment hours you have been able to assist in food preparation at Linda Vista under the guidance of the Senior Food Service Worker and the Area Manager.

ATTACHMENTS ADDED YES ☐ NO ☐

SECTION C
Employee was counseled on noted deficiencies: (Dates) _____ _____ _____

SUMMARY EVALUATION: (Check one) Unsatisfactory ☐ Requires Improvement ☐ Meets Standards ☐

IF PROBATIONARY: I do not ☐ I do ☐ RECOMMEND PERMANENT STATUS

SECTION D
Goals and Objectives:
Continue to accept new learning experiences when offered. Watch for information on various food related courses offered at local junior colleges and through food service department and City Schools Inservice training classes. These courses help provide a better understanding of our goals and aims within our own food service department.

RATER: REVIEWER:

_____ Signature _____ Date _____ Signature _____ Date

My supervisor has discussed this report with me and given me a copy of this evaluation report. I understand my signature does not necessarily indicate agreement.
Comments:

ATTACHMENTS ADDED YES ☐ NO ☐

_____ Signature _____ Date

Instructions For Use of the Performance Evaluation Report Form

The Performance Evaluation Report Form is designed to help those being evaluated to achieve and maintain high levels of work performance and behavior. The form can be used by supervisors as an effective counseling device and as a means for establishing performance goals. Please see the *Performance Evaluation Guide for Classified Employees* for detailed instructions.

General:

1. After marking very lightly with pencil each factor in Section A, the rater shall review the report with her/his principal or department head, if any. Markings and comments shall then by typed or inked in. Either the rater or reviewer (or both) shall then review the rating with the employee in a private interview. All signatures shall be in ink. Changes and corrections shall be initialed by the employee.

2. If space for comments is inadequate, attachments (either typewritten or in ink) may be included, but each must be signed and bear the same date as the Performance Evaluation Report Form.

3. Due dates shall be observed and are particularly important for final probationary reports. Filing dates are flexible; both the first and final reports may be filed at any time between their receipt and the printed due date.

4. All probationers (either new-hire or promotional) shall be evaluated no later than the end of their third full month of probationary service and again after nine full months, but not later than the end of the eleventh full month of such service. Probationers may be separated (or demoted, if permanent in a lesser class) at any time such action is deemed necessary by the principal or department head through use of either a scheduled or unscheduled performance evaluation report.

5. All permanent employees (who have completed at least five months of service in permanent status) shall be evaluated every two years as of the printed due date. Permanent employees may be separated or demoted in the same manner as probationary employees, provided that all pertinent merit system rules and district procedures are observed.

6. Unscheduled reports may be filed at any time to record progress achieved or specific work performance deficiences.

7. All performance evaluation reports in an employee's personnel department file are subject to review by principals or department heads whenever the employee is certified for transfer or promotion.

Section A: Check ( ) one column for each factor. N/A may be used when a factor is considered "not applicable" to a particular job. Each check mark in Unsatisfactory or Requires Improvement must have a specific explanation in Section B.

Section B: Describe outstanding qualities and superior performance. Give specific reasons for check marks in Unsatisfactory or Requires Improvement columns. Record here any other specific reasons why the employee should not be recommended for permanent status, or—if the employee is already permanent—any specific reasons for required improvement. Attachments, if included, should be indicated in space provided.

Section C: Enter the dates employee was counseled on noted deficiencies. SUMMARY EVALUATION: Check the appropriate box to indicate overall performance here, taking into account all factors and total performance for the full period of service being evaluated.

Unsatisfactory: Performance is clearly inadequate in one or more critical factors as explained or documented in Section B. Employee has demonstrated an inability or unwillingness to improve or to meet standards. Performance is not acceptable for position held. (Note: Such summary evaluation bars the employee from promotional examinations for one year.)

Requires Improvement: Total performance periodically or regularly falls short of normal standards. Specific deficiencies should be noted in Section B. This evaluation indicates the supervisor's belief that the employee can and will make the necessary improvements.

Meets Standards: Indicates consistently competent performance meeting or exceeding standards in all critical factors for the position. Most employees will fall in this category. If margin is narrow and standards are barely met, explain in Section B.

If Probationary: Make a recommendation regarding permanent status.

Section D: Record progress or improvements in performance resulting from employee's efforts to reach previously set goals. Record agreed-upon or prescribed performance goals for the next evaluation period.

Signatures: Both the rater and the employee shall date and sign the report. The employee's signature indicates that the conference has been held and that she/he has had an opportunity to read the report. If she/he refused to sign for any reason, explain that disagreement. Further refusal to sign shall be recorded in the report. Attachments, if included, should be indicated in space provided.

Appeal: Evaluation reports express the judgment and opinions of supervisor authority, and as such, are not subject to appeal under rules of the merit system unless there has been a resultant action taken to suspend, demote, or dismiss a permanent employee.